



REQUEST FOR QUALIFICATIONS

RESIDENTIAL BATTERY SELF-GENERATION INCENTIVE PROGRAM PROCESSING

TO: All Prospective Consultants

SUBJECT: Request for Qualifications: Residential Battery Self-Generation Incentive Program Processing

DATE ISSUED: December 27, 2019

RESPONSES DUE: January 24, 2020

I. PROJECT SUMMARY

Sonoma Clean Power Authority (“SCP”) issues this Request for Qualifications (RFQ) to solicit Statements of Qualifications (“Submittals”) from qualified entities (“Consultants”) for SCP’s Residential Battery Self-Generation Incentive Program (SGIP) Processing. SCP’s Residential Battery Energy Storage SGIP program will help residential customers install battery energy storage systems and reduce the price of their system by taking advantage of SGIP funding. Consultants selected for the Residential SGIP Processing program will work with SGIP-approved contractors to gather all necessary information and documents and apply for SGIP-funding on behalf of the customer and/or contractor. SCP will provide the projected SGIP incentive to the homeowner/contractor in anticipation of a successful SGIP application. The selected Consultant will also serve as the entity to provide the upfront incentive from an escrow account funded by SCP. SCP’s target date for commencement of the program is April 2020.

Minority-owned, women-owned and locally-headquartered businesses are encouraged to respond to this RFQ.

II. ABOUT SONOMA CLEAN POWER

SCP is a public, locally-run “community choice aggregation” power provider covering approximately 525,000 customers in Sonoma and Mendocino Counties (except Healdsburg and Ukiah). SCP’s mission is to turn the tide on the climate crisis through bold ideas and practical programs. For more information about SCP go to: www.sonomacleanpower.org.



III. RFQ TIMELINE

EVENT	DEADLINE
RFQ Published	December 27, 2019
Deadline for questions to be submitted	January 10, 2020
Responses to questions to be posted on SCP website	January 15, 2020
Submittal packages due	January 24, 2020
RFQ Submission review complete	February 7, 2020
Target Date for Interviews	Week of February 10, 2020

IV. PROJECT BACKGROUND & SCOPE

A. PROJECT BACKGROUND

In 2019, Sonoma and Mendocino County experienced three major power outages that lasted 3-5 days on each occurrence. These outages were due to PG&E’s expanded Public Safety Power Shut Off (“PSPS”) program. The power shut offs greatly impacted our customers, with over 114,000 accounts going dark, comprising 50% of our load. These PSPS events especially adversely impact our low-income, disadvantage and medically vulnerable customers. With the advent of PSPS events, back up energy systems like battery energy storage systems (“BESS”) have come to the forefront as a tool to help customers weather PSPS events.

In September of 2019, the California Public Utilities Commission (“CPUC”) directed \$100 million of Self-Generation Incentive Program (“SGIP”) funding towards high risk customers, like low-income customers, disadvantage and medically vulnerable customers, and people who live in high fire risk areas. The CPUC has proposed an update to the program to include added SGIP incentives for residents who have experienced two or more distinct PSPS events. With a large portion of SCP territory within the Elevated and Severe Fire Threat (Tier 2 and Tier 3) classifications, and therefore PSPS vulnerable, SCP aims to help customers install more BESS to help weather the events.

SCP has identified major barriers to participation in the SGIP program. One primary barrier is the complexity in navigating the application process. This has led many contractors to not apply for SGIP funding for their residential battery energy storage projects. The result is higher costs for customers and inaccessibility by many high-risk customers.



SCP wishes to simplify the SGIP application process on behalf of our customers and contractors to encourage the installation of more battery systems and reduce the cost, especially to high-risk and vulnerable customers. The services rendered by the selected Consultant will help achieve this goal.

B. PROJECT SCOPE

To help simplify the SGIP application process on behalf of our customers and contractors, and to encourage more installations of battery energy storage systems, SCP will develop a program that will provide the SGIP incentive upfront to the contractor using SCP funds. SCP will collect the SGIP funding on the backend for the project using the selected Consultant.

This program would follow the following process:

1. SCP selects a Consultant to apply and manage the SGIP application process on behalf of SCP and the contractor.
2. SGIP-approved contractor applies to SCP's selected Consultant for the upfront incentive from SCP and assigns the incentive over to SCP.
3. Selected Consultant works with SGIP-approved contractor to gather required documentation for SGIP submission.
4. Selected Consultant verifies documents are aligned with SGIP program rules and pays the SGIP-approved contractor the upfront incentive.
5. Selected Consultant applies to receive SGIP funding and manages the application through approval.
6. Selected Consultants secure SGIP funding and lists SCP as the payee.

Selected Consultant will be responsible for the following:

Contractor (Customer) Facing:

- Develop a process to accept inquiries and/or applications from SGIP-approved contractors for funding;
- Provide a checklist of the necessary documents needed to be provided by SGIP-approved contractors to qualify for SGIP funding;
- Work with and communicate with SGIP-approved contractors to gather all the SGIP required documents, per the [SGIP Handbook](#);
- Provide customer service to contractors via phone and email, answering questions;

Backend:

- Verify all submitted documents and determine the maximum amount of funding eligible from SGIP;
- Review submitted documents against the checklist to determine whether the project will be approved for funding; Secure all the necessary documents and signatures to submit a successful application;



- Provide SGIP-approved contractors with the SGIP-eligible funding amount from SCP's escrow account via ACH transfer or physical check;
- Submit complete application in accordance with the SGIP Handbook on behalf of SGIP-approved contractors to the SGIP Program Administrator (PG&E);
- Manage the application process, including, but not limited to:
 - responding to questions and request from the Program Administrator;
 - Completing and submitting Incentive Claim Form documents;
 - Assign SCP as the payee once incentive payment process begins.
- Provide SCP with original copies of Confirmed Reservation Letters, Incentive Claim Forms, and other supporting documents;

Project Management

- Invoice SCP on a monthly basis in accordance with a Professional Service Agreement;
- Request additional escrow funding in accordance with a Professional Service Agreement;
- Provide monthly reports to SCP on the applications submitted, outstanding incentives amount applied for in SGIP; incentives paid from escrow account, list of contractors applying for incentives, etc.

V. CONSULTANT MINIMUM REQUIREMENTS

All Consultants must adhere to the following minimum qualifications. Any Consultant not meeting minimum qualifications will not be considered:

- A. Must be licensed, and in good standing, to do business in the State of California;
- B. Must have thorough knowledge and experience with the SGIP application process;
- C. Must have experience successfully applying for SGIP funding;
- D. Must be registered and possess an active account at www.selfgenca.com, and be in good standing with the Program Administrator;
- E. Must be able to track and manage SGIP funding requests for over 12-months, and troubleshoot any issues that may come up during that time;
- F. Must have the ability to initiate ACH transfers to contractors and track payments of incentive dollars;
- G. Must have the ability to issue checks to contractors and track payments of incentive dollars;
- H. Must be able to maintain an escrow account for incentive dollars;
- I. Must be able to provide monthly reports to SCP;



VI. SELECTION PROCESS

- A. Responses will be scored based on:
1. Thoroughness and creativity of response.
 2. Professional qualifications and demonstrated ability of Consultant to perform the work.
 3. Consultant's competence, technical ability and related experience.
 4. Ability and history of successfully completing projects of a similar type, meeting delivery deadlines and experience with similar work.
 5. Exceptions to SCP's Standard Agreement (Exhibit A).
 6. Completeness and quality of submittals.
 7. Quality of references.
 8. Satisfaction of minimum and desired Consultant requirements, as described in this RFQ.
 9. Any other factors SCP deems relevant.
- B. Depending on the responses to this RFQ and interviews, SCP may choose to contract with more than one firm or individual, regardless of whether such individual and/or firm responded to this RFQ. Any selected Consultant(s) will be contacted by SCP staff to finalize a contract. SCP staff will evaluate the responses to this RFQ, may, in its discretion, interview selected firms and individuals that staff determine are most qualified.
- C. **Issuance of this RFQ is not a guarantee that SCP will enter into any contract with any respondent.** SCP reserves the right, at its sole discretion, to waive irregularities in submittals, RFQ requirements (including minimum/desired Consultant and Product requirements), to request modifications of any submittal, to accept or reject any or all submittals received, and to cancel all or part of this RFQ at any time prior to awards.
- D. Responses that do not satisfy RFQ and submittal requirements cannot be adequately evaluated.

VII. QUESTIONS REGARDING THE RFQ; ADDENDA

For questions regarding this RFQ, please contact: programs@sonomacleanpower.org with the subject line clearly marked "*SGIP Processing RFQ - Questions.*" Questions must be received no later than the deadline set forth in section III of this RFQ. SCP will not guarantee providing answers to questions submitted after the question deadline but will make reasonable efforts to do so. SCP will post and share responses to all questions submitted by the deadline established in this RFQ publicly.



In the event it becomes necessary to revise any part of this RFQ, SCP will issue written addenda. Any amendment to this RFQ is only valid if it is in writing and issued by SCP. No oral interpretations or answers will bind SCP. All addenda issued by SCP will become part of this RFQ.

VIII. RFQ SUBMITTAL PROCESS

- A. **Submittal Deadline.** The deadline for submittal of qualifications is set forth in section III of this RFQ. No submittals will be accepted after that time.
- B. **Place and Form of Submittal.** One copy of the submittal should be emailed to programs@sonomacleanpower.org with the subject line clearly marked "*SGIP Processing RFQ Submittal*". Upon submittal, you will receive a confirmation of receipt. Mailed, hand delivered, or faxed submittals will not be accepted.
- C. **Representation.** Submission of a submittal shall be deemed a representation that the Consultant:
 - 1. Has carefully read and fully understands the information provided by SCP as part of this RFQ, including all Exhibits;
 - 2. Represents that all information submitted is true and correct;
 - 3. Did not, in any way, collude, conspire to agree, directly or indirectly, with any person, firm, corporation or other firm in regard to the amount, terms or conditions of its submittals; and
 - 4. Acknowledges that SCP has the right to make any inquiry it deems appropriate to substantiate or supplement information as necessary.
- D. **Modification.** No request for modification of a submittals shall be considered after submission on the grounds that a Firm was not fully informed about any fact or condition.

IX. SUBMITTALS REQUIREMENTS

- A. Consultants should provide only complete and accurate information.
- B. Each submittal must be signed by an individual who has the legal authority to bind the Consultant on whose behalf that person is signing.
- C. The submittals shall contain the following sections (1-4), and be no longer than 10 pages, minus attachments.
 - 1. Cover Sheet. Cover sheet signed by individual with authority to bind firm.
 - 2. Company information. Submit a brief history and description of your company's operations. Include the following:
 - (a) The scope and nature of your company
 - (b) Years of operation



- (c) Resumes of key personnel
 - (d) Number of full-time employees
 - (e) Identify your company's standard hours of operation
 - (f) Link to your company's website
 - (g) Identify any litigation pending or threatened against your company
 - (h) Identify any instances in which your company was disbarred
3. Experience.
- (a) Discuss your experience applying for SGIP funding for residential projects and how many have successfully secured funding. Describe barriers/challenges you encountered and how you overcame them.
 - (b) Discuss your program management experience such as accepting and processing applications, managing and reviewing applications, issuing incentive payments to third-party contractors, etc.
 - (c) Describe how you would approach partnering with SCP to implement an upfront SGIP incentive program as described in Section IV.B and seek SGIP funding on behalf of our customers/contractors.
4. Standard Agreement Exceptions. Identify exceptions to SCP's Standard Agreement (Exhibit A).

X. GENERAL TERMS AND CONDITIONS

A. SCP Standard Agreement.

1. Contracts for services will be between the Consultant and SCP. A sample of SCP's Standard Agreement is included as Exhibit A. Consultants must be willing to provide the required insurance and accept the terms of SCP's Standard Agreement. A Consultant taking exception to any part of the Standard Agreement must also provide alternative language for those provisions considered objectionable. Please note that any exceptions or changes requested to the Standard Agreement may constitute grounds to reject the submittal.
2. Failure to address exceptions to the Standard Agreement in your statement will be construed as acceptance of all terms and conditions contained therein. No negotiation over Standard Agreement provisions will be permitted unless the provisions were objected to when the submittal was submitted.
3. SCP reserves the right to further negotiate existing or additional elements of its Standard Agreement with successful Consultants.



- B. **California Public Records Act.** All submittals submitted in response to this request shall be subject to disclosure under the California Public Records Act. In the event that a Consultant desires to claim portions of its submittal exempt from disclosure, it is incumbent upon the Consultant to clearly identify those portions with the word "confidential" printed on the lower right-hand corner of the page. SCP will consider a Consultant's request for exemption from disclosure; however, SCP will make a decision based upon applicable laws. Assertions by a Consultant that the entire submittal or large portions are exempt from disclosure will not be honored. All responses to this Request for Qualifications shall become the property of SCP and will be retained or disposed of accordingly.
- C. All submittals received by the specified deadline will be reviewed by SCP for content, including but not limited to amount of discount offered, experience and qualifications of the bidding Consultants.
- D. During the evaluation process SCP may request from any Consultant additional information which SCP deems necessary to determine the Consultant's ability to perform the required services.
- E. Respondents bear all costs associated with responding to this RFQ, and SCP will provide no compensation for these costs.

XI. RIGHTS OF SONOMA CLEAN POWER

- A. This RFQ does not commit SCP to enter into a contract, nor does it obligate SCP to pay for any costs incurred in the preparation and submission of a qualifications statement or in anticipation of a contract.
- B. SCP reserves the right to:
 - 1. Make the selection based on its sole discretion;
 - 2. Reject any and all Statements of Qualifications;
 - 3. Issue subsequent solicitations;
 - 4. Postpone any of the time periods set forth in this RFQ, for its own convenience;
 - 5. Remedy technical errors in the RFQ;
 - 6. Approve or disapprove the use of particular subconsultants;
 - 7. Negotiate with any, all, multiple or none of the Consultants that respond;
 - 8. Alter SCP's Standard Agreement to be inclusive of any unique, unanticipated legal concerns.
 - 9. Negotiate a final project scope that includes all, just a portion or related additional items relative to the Proposed Project Scope set forth in this RFQ;
 - 10. Negotiate any price or provisions and accept any part, or all parts of any or all submittals, whichever is in the best interest of SCP;



11. Waive informalities and irregularities in the Statements of Qualifications;
12. Utilize others to perform or supply work of the type contemplated by this RFQ;
13. Request submittals from others with or without requesting submittals from contractors for the work of the type contemplated by this RFQ; and/or
14. Enter into an agreement with another Firm or re-solicit the Project in the event the originally selected firm defaults or fails to execute an agreement with SCP.

C. SCP reserves the right not to contract with any Consultant. If SCP decides to contract, SCP will contract with the Consultants whose responses best meets the needs of SCP, consistent with the selection process set forth above.

- D. An agreement is not binding or valid with SCP unless and until it is executed by authorized representatives of SCP and the Consultant selected.
- E. Evaluation of a response does not constitute a commitment by SCP to acquire such services from any source. SCP is not obligated in any way to proceed with this RFQ or consider or enter into any agreement or undertake any liability to any firm in connection with this RFQ and any and all responses, whether qualified or not, may be rejected without any liability whatsoever to any firm on the part of SCP. SCP shall not be responsible for any costs incurred by a firm to prepare, submit, negotiate, contract or otherwise participate in this RFQ process.

AGREEMENT FOR PROFESSIONAL SERVICES

This Agreement for Professional Services (“Agreement”), dated as of [REDACTED] (“Effective Date”) is made by and between the Sonoma Clean Power Authority (“SCPA”), a California joint powers authority, and [REDACTED] (“Consultant”). SCPA and Consultant may be individually referred to as a “Party” or collectively as “Parties.”

1. **Scope of Services:** Consultant agrees to provide any and all of the services as described in Exhibit A.
2. **Performance Standard:** Consultant warrants that it possesses the necessary training, experience and skill to competently and professionally provide the services described in Exhibit A. If SCPA determines that any of Consultant’s work is not in accordance with the level of competency and standard of care normally observed by a person practicing in Consultant’s profession, SCPA, in its sole discretion, shall have the right to do any or all of the following:
 - a. require Consultant to meet with SCPA to review the quality of Consultant’s work and resolve matters of concern;
 - b. require Consultant to repeat the work at no additional charge until the work meets the level of competency and standard of care normally observed by a person in Consultant’s profession;
 - c. terminate this Agreement pursuant to Section 6; or
 - d. pursue any and all other remedies at law or in equity.
3. **Payment:** Consultant shall submit one invoice for each calendar month in which services are performed. Invoices shall be signed by key staff, include copies of receipts for pre-approved reimbursable expenses, and contain the following detail for each billable entry:
 - a. Date;
 - b. Detailed description of work performed and person(s) involved; and
 - c. Time spent in 1/10th hour increments.

Upon receipt of properly prepared invoicing, SCPA shall pay Consultant within thirty (30) calendar days for services provided in accordance with this Agreement, applying the following rates:

 - a. Fees based on the Fee Schedule, as set forth in Exhibit B; and
 - b. Reimbursable expenses must be pre-approved by SCPA.
4. **NOT TO EXCEED AMOUNT.** IN NO EVENT SHALL THE AMOUNT PAYABLE FOR SERVICES PERFORMED DURING THE TERM OF THIS AGREEMENT EXCEED [write out amount] dollars (\$ [REDACTED]). This dollar amount is not a guarantee that SCPA will pay that full amount to Consultant but is merely a limit of potential SCPA expenditures under the Agreement.

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5. Term of the Agreement: The initial term of this Agreement shall be from the Effective Date to [REDACTED], unless terminated pursuant to Section 6 or amended by a written, executed amendment to the Agreement. Consultant understands and agrees that funding for costs under this Agreement after June 30, 2019 is subject to approval by SCPA's Board of Directors of a budget including such funding, and that SCPA may terminate this Agreement pursuant to Section 6 below if such funding is not approved.
6. Termination:
 - a. Notwithstanding any other provision of this Agreement, at any time and without cause, the CEO of SCPA shall have the unequivocal right to terminate this Agreement by giving thirty (30) calendar days written notice to the other Party.
 - b. Notwithstanding any other provision of this Agreement, should Consultant fail to perform any of its obligations or violate any of the terms of this Agreement (Termination for Cause), the CEO of SCPA may, upon providing Consultant written notice stating the reason for termination, immediately terminate this Agreement. In the event of termination, Consultant, within fourteen (14) calendar days following the date of termination, shall deliver to SCPA all materials and work product subject to Section 16 and shall submit to SCPA a final invoice for all outstanding payments.
7. Indemnification: Consultant agrees to accept all responsibility for loss or damage to any person or entity, including the SCPA, and to indemnify, hold harmless, and release the SCPA, its officers, agents, and employees, from and against any actions, claims, damages, liabilities, disabilities, or expenses, that may be asserted by any person or entity, including Consultant, that arise out of, pertain to, or relate to Consultant's performance of or obligations or omissions under this Agreement. Consultant agrees to provide a complete defense for any claim or action brought against the SCPA based upon a claim relating to Consultant's performance or obligations or omissions under this Agreement. Consultant's obligations under this Section apply whether or not there is concurrent negligence on the SCPA's part, but to the extent required by law, excluding liability due to the SCPA's conduct, specifically SCPA's sole negligence, active negligence or willful misconduct. The SCPA shall have the right to select its legal counsel at Consultant's expense, subject to Consultant's approval, which shall not be unreasonably withheld.
8. Insurance: Consultant shall maintain and shall require all of its subcontractors, consultants, and other agents to maintain insurance as described below unless such insurance has been expressly waived in writing by SCPA.
 - a. Workers' Compensation. If Consultant has employees at any time during the term of this Agreement, Workers Compensation insurance with statutory limits as required by the Labor Code of the State of California,

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and Employers Liability with minimum limits of \$1,000,000 per accident; \$1,000,000 disease per employee; \$1,000,000 disease per policy.

- b. Commercial General Liability. Commercial General Liability Insurance with Minimum Limits: \$1,000,000 per occurrence; \$2,000,000 general aggregate; \$2,000,000 products/completed operations aggregate. The required limits may be provided by a combination of General Liability Insurance and Commercial Umbrella Liability Insurance. If Consultant maintains higher limits than the specified minimum limits, SCPA requires and shall be entitled to coverage for the higher limits maintained by Consultant.
 - i. Any deductible or self-insured retention shall be shown on the Certificate of Insurance. Deductibles or self-insured retention that exceeds \$25,000 must be approved in advance by SCPA. Consultant is responsible for any deductible or self-insured retention and shall fund it upon SCPA's written request, regardless of whether Consultant has a claim against the insurance or is named as a party in any action involving SCPA.
 - ii. SCPA shall be an additional insured for liability arising out of operations by, or on behalf of, the Consultant in the performance of this Agreement.
 - iii. The insurance provided to the additional insureds shall be primary to, and non-contributory with, any insurance or self-insurance program maintained by them.
 - iv. The policy shall cover inter-insured suits between the additional insureds and Consultant and include a "separation of insureds" or "severability" clause which treats each insured separately.
- c. Automobile Liability. Automobile Liability Insurance with Minimum Limit of \$1,000,000 combined single limit per accident. Automobile Insurance shall apply to all owned autos. If Consultant currently owns no autos, Consultant agrees to obtain such insurance should any autos be acquired during the term of this Agreement. Automobile Insurance shall apply to hired and non-owned autos.
- d. Professional Liability. Professional Liability/Errors and Omissions Insurance with Minimum Limit of \$1,000,000 per claim or per occurrence. Any deductible or self-insured retention shall be shown on the Certificate of Insurance. If the deductible or self-insured retention exceeds \$25,000 it must be approved in advance by SCPA. If the insurance is on a Claims-Made basis, the retroactive date shall be no later than the commencement of the work. Coverage applicable to the work performed under this Agreement shall be continued for two (2) years after completion of the work. Such continuation coverage may be provided by one of the following: (1) renewal of the existing policy; (2) an extended reporting

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period endorsement; or (3) replacement insurance with a retroactive date no later than the commencement of the work under this Agreement.

e. All Policies Requirements.

- i. Insurers, other than the California State Compensation Insurance Fund, shall have an A.M. Best's rating of at least A: VII.
- ii. The Certificate of Insurance must include the following reference: Sonoma Clean Power Authority.
- iii. All required Evidence of Insurance shall be submitted to SCPA within 3 business days of the Effective Date. Consultant agrees to maintain current Evidence of Insurance on file with SCPA for the entire term of this Agreement.
- iv. The name and address for Additional Insured endorsements and Certificates of Insurance is: Sonoma Clean Power Authority, Attn: Contract Administration, 50 Santa Rosa Avenue, Fifth Floor, Santa Rosa, CA, 95404.
- v. Required Evidence of Insurance shall be submitted for any renewal or replacement of a policy that already exists, at least ten (10) business days before expiration or other termination of the existing policy.
- vi. Consultant shall provide SCPA immediate written notice if: (A) any of the required insurance policies are terminated; (B) the limits of any of the required policies are reduced; and/or (C) the deductible or self-insured retention is increased.
- vii. Upon written request, certified copies of required insurance policies must be provided within thirty (30) calendar days.
- viii. Consultant's indemnity and other obligations shall not be limited by these insurance requirements.

9. **Status of Consultant:** Consultant, in performing the services under this Agreement, shall act as an independent contractor and shall control the work and the manner in which it is performed. At no time shall Consultant work as an agent or employee of SCPA and at no time shall Consultant be entitled to participate in any pension plan, worker's compensation plan, insurance, bonus, or similar benefits SCPA provides its employees. In the event SCPA exercises its right to terminate this Agreement pursuant to Section 6, Consultant expressly agrees that it shall have no recourse or right of appeal under rules, regulations, ordinances, or laws applicable to employees.

10. **No Suspension or Debarment:** Consultant warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or

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voluntarily excluded from participation in covered transactions by any state or federal department or agency. Consultant also warrants that it is not suspended or debarred from receiving federal funds as listed in the List of Parties Excluded from Federal Procurement or Non-procurement Programs issued by the General Services Administration.

11. Taxes: Consultant agrees to file federal and state tax returns and pay all applicable taxes on amounts paid pursuant to this Agreement. Consultant shall be solely liable and responsible to pay such taxes and other obligations, including, but not limited to, state and federal income and FICA taxes. Consultant agrees to indemnify and hold SCPA harmless from any liability which it may incur to the United States or to any US State as a consequence of Consultant's failure to pay, when due, all such taxes and obligations. In the event SCPA is audited for compliance regarding any withholding or other applicable taxes, Consultant agrees to, in a timely fashion, furnish SCPA with proof of payment of taxes on these earnings.
12. Records Maintenance: Consultant shall keep and maintain full and complete documentation and accounting records concerning all services performed that are compensable under this Agreement and shall make such documents and records available to SCPA for inspection at any reasonable time. Consultant shall maintain such records for a period of five (5) years following the expiration or termination of this Agreement.
13. Conflict of Interest: Consultant warrants that it presently has no interest, and that it will not acquire any interest, direct or indirect, that represents a financial conflict of interest under state law or that would otherwise conflict in any manner or degree with Consultant's performance under this Agreement. Consultant further warrants that in the performance of this Agreement no person having any such interests shall be assigned by Consultant to perform work under this agreement nor be given access to the information described in Section 16. Consultant shall comply with any and all applicable California Fair Political Practices Act requirements.
14. Statutory Compliance: Consultant shall comply with all applicable federal, state and local laws, regulations, statutes and policies applicable to the Services provided under this Agreement.
15. Nondiscrimination: Without limiting any other provision of this Agreement, Consultant shall comply with all applicable federal, state, and local laws, rules, and regulations in regard to nondiscrimination in employment because of race, color, ancestry, national origin, religion, sex, marital status, age, medical condition, pregnancy, disability, sexual orientation or other prohibited basis. All nondiscrimination rules or regulations required by law to be included in this Agreement are incorporated by reference.
16. Confidentiality, Ownership and Disclosure of Work Product: All information obtained by Consultant under this Agreement shall be deemed confidential ("Confidential Information"). Unless SCPA provides written permission,

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Consultant is compelled by a court of law or regulatory agency, or Consultant obtained Confidential Information from a source or sources other than SCPA, Consultant shall not share Confidential Information with any other person or entity outside of SCPA staff and SCPA authorized representatives. Consultant further agrees to execute non-disclosure agreements related to protecting Confidential Information as requested by SCPA. Provisions related to Confidential Information shall survive expiration or termination of the Agreement for a period of five (5) years. All reports, original drawings, graphics, plans, studies, and other data or documents (“Documents”), in whatever form or format, produced by Consultant or Consultant’s subcontractors, consultants, and other agents within the term and scope of this Agreement shall be the property of SCPA. SCPA shall be entitled to immediate possession of such Documents upon completion of the work pursuant to this Agreement. Upon expiration or termination of this Agreement, Consultant shall promptly deliver to SCPA all such Documents, which have not already been provided to SCPA in such form or format, as SCPA deems appropriate. Such Documents shall be and will remain the property of SCPA without restriction or limitation.

17. Assignment and Delegation: Parties shall not assign, delegate, sublet, or transfer any interest in, or duty under, this Agreement without the prior written consent of the other.
18. Written Communications: All written communications, including notices, bills and payments, may be made via electronic mail or to the following addresses:

TO SCPA: Sonoma Clean Power Authority
Attn: Contract Administration
50 Santa Rosa Avenue, 5th Floor
Santa Rosa, CA 95404
[PROJECT MANAGER EMAIL]

With Copies to:

Sonoma Clean Power Authority
ATTN: General Counsel
50 Santa Rosa Avenue, 5th Floor
Santa Rosa, CA 95404
jmullan@sonomacleanpower.org

TO CONSULTANT:

[CONSULTANT NAME]
ATTN: [CONSULTANT]
[CONSULTANTS STREET ADDRESS]
[CONSULTANTS CITY & ZIP]
[CONSULTANTS EMAIL]

19. No Waiver of Breach: The waiver by SCPA of any breach of any term or promise contained in this Agreement shall not be deemed to be a waiver of such term or

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provision or any subsequent breach of the same or any other term or promise contained in this Agreement.

20. **Construction:** To the fullest extent allowed by law, the provisions of this Agreement shall be construed and given effect in a manner that avoids any violation of statute, ordinance, regulation, or law. The Parties agree that in the event that any provision of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired, or invalidated. The Parties acknowledge that they have each contributed to the making of this Agreement and that, in the event of a dispute over the interpretation of this Agreement, the language of the Agreement will not be construed against one Party in favor of the other. Parties acknowledge that they have each had an adequate opportunity to consult with counsel in the negotiation and preparation of this Agreement.
21. **Consent:** Wherever in this Agreement the consent or approval of one Party is required to an act of the other Party, such consent or approval shall not be unreasonably withheld or delayed.
22. **No Third-Party Beneficiaries:** Nothing contained in this Agreement shall be construed to create, and the Parties do not intend to create, any rights in third parties.
23. **Choice of Law and Forum:** This Agreement shall be construed and interpreted according to the substantive law of California, regardless of the law of conflicts to the contrary in any jurisdiction. Any action to enforce the terms of this Agreement, or for the breach of this Agreement, shall be brought and tried in Santa Rosa, California, or the forum nearest to the city of Santa Rosa, in the County of Sonoma.
24. **Exhibits; Order of Precedence:**
 - a. **Exhibits.** This Agreement includes the following Exhibits:
 - i. Exhibit A - Scope of Services
 - ii. Exhibit B - Fee Schedule
 - iii. **Optional Exhibits.** Consultant agrees to be bound by the terms and conditions set forth in any of the exhibits selected below as if the terms and conditions were fully set forth in this Agreement. Exhibits not selected below do not apply to this Agreement.

 Exhibit C - Non-Disclosure Agreement

 Exhibit D - Prevailing Wage Requirements

AGREEMENT FOR PROFESSIONAL SERVICES

- b. Order of Precedence. In the event of a conflict between the body of this Agreement and any Exhibits or attachments, the language in the body of this Agreement shall prevail. In the event of a conflict between the Exhibits, the order of precedence set forth in section 24(a) applies.
- 25. Captions: The captions in this Agreement are solely for convenience of reference. They are not a part of this Agreement and shall have no effect on its construction or interpretation.
- 26. Merger: This writing is intended both as the final expression of the Agreement between the Parties with respect to the included terms and as a complete and exclusive statement of the terms of the Agreement, pursuant to California Code of Civil Procedure Section 1856.
- 27. Amendment: No modification of this Agreement shall be effective unless and until such modification is evidenced by a writing signed by both Parties.
- 28. Survival of Terms: All express representations, waivers, indemnifications, and limitations of liability included in this Agreement will survive its completion or termination for any reason.
- 29. Time of Essence: Time is and shall be of the essence of this Agreement and every provision within this Agreement.
- 30. Joint Powers Authority. Consultant hereby acknowledges that SCPA is organized as a Joint Powers Authority in accordance with the Joint Powers Act of the State of California (Cal. Govt. Code section 6500 *et seq.*, as the same may be amended from time to time) pursuant to a Third Amended and Restated Joint Powers Agreement dated October 13, 2016 (the "Joint Powers Agreement"), that SCPA is a public entity separate from its members, and that under the Joint Powers Agreement the members have no liability for any obligations or liabilities of SCPA. Consultant agrees that SCPA shall solely be responsible for all debts, obligations and liabilities accruing and arising out of the Agreement and Consultant agrees that it shall have no rights against, and shall not make any claim, take any actions or assert any remedies against, any of SCPA's members, any cities or counties participating in SCPA's community choice aggregation program, or any of SCPA's retail customers in connection with this Agreement.

[SIGNATURES TO APPEAR ON FOLLOWING PAGE]

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AGREEMENT FOR PROFESSIONAL SERVICES

By signing below, the signatories warrant that each has authority to execute this Agreement on behalf of their respective Parties, and that this Agreement is effective as of the Effective Date.

**SONOMA CLEAN POWER
AUTHORITY**

CONSULTANT

BY: _____
Geof Syphers
Chief Executive Office

BY: _____
[Signatory Name]
[Title]

Date: _____

DATE: _____

APPROVED AS TO FORM

BY: _____
Jessica Mullan
General Counsel

DATE: _____

EXAMPLE

Exhibit A
Scope of Services

[Insert Scope of Services/Work]

EXAMPLE

Exhibit B
Budget & Fee Schedule

[Insert Budget & Fee Schedule]

EXAMPLE

Exhibit C
Non-Disclosure Agreement

- Included
- Not Included

EXAMPLE

Exhibit D
Prevailing Wage Requirements

- Included
- Not Included

EXAMPLE